



# M e m o r a n d u m

To: Panel Members Date: December 19, 2002

From: Peter McNamee, Executive Director File: J:/planning/stratactplan/  
December Panel memo  
on action plans.doc

Subject: IMPLEMENTATION OF THE 2002-03 STRATEGIC PLAN

This memorandum seeks approval for action plans to implement the objectives outlined in the Fiscal Year (FY) 2002-03 Strategic Plan. The Strategic Plan was approved by the Panel and submitted to the Governor and Legislature in accordance with ETP's mandate with the understanding that staff would develop implementation plans to accomplish the objectives in the Plan.

Draft plans were subsequently provided to you at the November Panel meeting for review. Each implementation plan describes the importance of the objective addressed, lists activities and milestones, identifies responsible staff and resources needed, provides timelines, and summarizes the overall result of achieving the objective. Technical edits and clarifications have been made in finalizing the plans. No proposed changes to the draft plans were received from Panel members prior to the preparation of this transmittal.

Also attached is a monthly calendar of key implementation milestones. This calendar has been expanded to include activities in Fiscal Year (FY) 2003-04, since a number of objectives carry over into that fiscal year.

As discussed at the November Panel meeting, the 2002-03 Strategic Plan is ambitious in that it includes ten goals that encompass a total of 41 objectives. Staff believes that 18 objectives can be accomplished in the current fiscal year; and an additional 14 can be completed within time frames, which extend beyond the current fiscal year. However, because of ETP resource constraints, it is recommended that nine objectives be deferred, at least in part, and reconsidered in the 2003-04 Strategic Plan development process.

The attached plans represent staff's best estimate regarding the work necessary to implement Strategic Plan objectives and the time frames involved. However, given the uncertainty of the State Budget and the potential impact on the Employment Training Panel (ETP) program, we may need to make further changes to the Strategic Plan's goals and objectives, if ETP's resources are reduced in the future.

I look forward to working with the Panel Members, as we implement the objectives of this year's Plan.

**Proposed Action**

Approval of staff's plans to implement the FY 2002-03 Strategic Plan goals and objectives.

Attachment

## **FY 2002-03 Action Plans Calendar of Major Activities**

### **July, 2002**

- Initiate tracking system for monthly reporting of training expenditures for: a) manufacturing and high tech industries, b) Special Employment Training; c) unemployed workers; and d) high unemployment areas. (Goal 1-Obj 1 through 4, Goal 8-Obj 4, and Goal 9-Obj 1)
- Update on Labor and Workforce Development Agency (LWDA). (Goal 2-Objective 3, Goal 4, and Goal 10)

### **August, 2002**

- Initiate Small Business Pilot Project. (Goal 7-Objective 1)
- Begin automating additional processes, forms and procedures, as identified, including new training plan for contract flexibility. (Goal 8-Objective 3)

### **September, 2002**

- Submit Budget Change Proposals (BCP) to Department of Finance (DOF), via LWDA, for ETP funding code and reversion of ETF funds. (Goal 4, and Goal 10-Objective 1)
- Executive Director participation in LWDA Strategic Planning – assigned lead role for Agency outreach efforts. (Goal 4-Objective 2, and Goal 10)

### **October, 2002**

- Northern California SOST Session. (Goal 5, and Goal 8-Objective 6)
- Policy issues: Training for Managers/Supervisors; High Unemployment Areas policy, wage waiver limits for working poor trainees; service charges as wages. (Goal 6-Objective 5, Goal 8-Objective 6, and Goal 9)
- Submit initial BCP to the LWDA to address the ETF shortfall. (Goal 4, and Goal 10-Objective 1)

### **November, 2002**

- Submit revised BCP to DOF, via LWDA, to address ETF shortfall. (Goal 4, and Goal 10-Objective 1)
- Policy issue: Apprenticeship Training. (Goal 5-Objective 1, and Goal 8-Objective 6)
- Southern California SOST Session. (Goal 5, and Goal 8-Objective 6)
- Initiate RFP process to select marketing partners. (Goals 1, 2, 6 and 9)
- Submit implementation action plans for objectives adopted in the 2002/03 Strategic Plan. (all goals)
- Submit Annual Report for adoption. (All Goals)

## **FY 2002-03 Action Plans Calendar of Major Activities**

### **December, 2002**

- Initiate RFP process to select evaluator of Career Ladder projects. (Goal 1-Objective 5b)

### **January, 2003**

- Policy hearing: Wage waiver limits for Career Ladder trainees. (Goal 1-Objectives 5b and 6, and Goal 6-Objective 5)
- Seamless development and monitoring implemented/staff training completed in San Diego and North Hollywood regional offices. (Goal 3-Objective 3)
- Staff meeting with State CWIB to develop collaborative approaches. (Goal 10-Objective 2)
- Regulations Workgroup completes review; sets Regulations Calendar. (Goal 8-Objective 6)
- Policy hearing: Out-of State-Competition Regulation. (Goal 8-Objective 6)

### **February, 2003**

- SOST recommendations submitted to Panel. (Goal 5, and Goal 8-Objective 6)
- Implement On-line Orientation/RED process. (Goal 8-Objective 2)
- Small Business Pilot Project Evaluator selected; evaluation begins. (Goal 7-Objective 1)
- Policy hearing: Employment Retention Requirements. (Goal 8-Objective 6)

### **March, 2003**

- Marketing partners announced, per RFP process. (Goals 1, 2, 6 and 9)
- Complete California State Accounting and Reporting System (CALSTARS) feasibility study; begin developing expenditure tracking system, using CALSTARS, if determined feasible. (Goal 8-Objective 5)
- Complete Assessment of high-wage jobs for working poor trainees; establish baseline for improvement. (Goal 9)
- Career Ladder evaluator selected. (Goal 1-Objective 5b)

### **April, 2003**

- Policy hearing: Supplemental Training Issue. (Goal 5)
- Panel planning session for FY 2003-04 Strategic Plan. (All goals)
- New Hire occupations and SET growth sectors identified for incorporation in Strategic Plan. (Goal 1-Objectives 3 and 4)
- Recommendation to Panel on "best occupations for new hire projects. (Goal 1-Objective 3)
- Proposal to Panel regarding customer advisory committee for IT initiatives. (Goal 8-Objective 7)

## **FY 2002-03 Action Plans Calendar of Major Activities**

### **May, 2003**

- Recommendations to Panel on Supplemental Training Issue. (Goal 5)
- Policy hearing: Nurse Mentoring Policy (Goal 1-Objective 7)

### **June, 2003**

- Submit 2003-04 Strategic Plan. (All Goals)
- Policy hearing: Appropriate types and levels of employer contributions. (Goal 5, and Goal 8-Objective 6)
- Report on wage waivers. (Goal 6-Objective 5, and Goal 9)
- Report on expenditure tracking automation (CALSTARS or internal). (Goal 8-Objective 5)

### **July, 2003**

- Tools developed for improved project performance. (Goal 3-Objective 1)
- Implement tracking system for contractor turnover rates. (Goal 6-Objective 4)

### **August, 2003**

- Determine feasibility of project evaluation model to identify better project evaluation tools. (Goal 8-Objective 1)

### **September, 2003**

- Submit BCP's for FY 2004-05 Budget, as necessary. (Goal 1-Objective 8, Goal 2, Objective 3; Goal 4-Objective 2; Goal 10-Objective 1)

### **October, 2003**

- Seamless development and monitoring implemented in all four regional offices. (Goal 3-Objective 3)
- If feasible, initiate study to identify better project evaluation tools. (Goal 8-Objective 1)

### **November, 2003**

- Submit Annual Report for adoption. (All Goals)

### **December, 2003**

- ETP Effectiveness Study Completed (Goal 1-Objective 5)
- Recommendations resulting from staff evaluation of incremental funding process. (Goal 3-Objective 2)
- Recommendations on ETP's additional data needs (Goal 8-Objective 4)

## **FY 2002-03 Action Plans Calendar of Major Activities**

### **January, 2004**

- Development of exemplary model programs begins. (Goal 7-Objective 2)

### **February, 2004**

- Implement approved recommendations from ETP effectiveness study. (Goal 1-Objective 5)
- Conduct forum with stakeholders in economic development and workforce preparation. (Goal 10-Objective 3)

### **March, 2004**

- Implement new policies, procedures and regulations resulting from evaluation of incremental funding process. (Goal 3-Objective 2)

### **April, 2004**

- Career Ladder Study completed. (Goal 1-Objective 5)
- Panel planning session for FY 2004-05 Strategic Plan. (All Goals)

### **May, 2004**

- Presentation of staff findings and recommendations regarding new methods of assessing value added by ETP training programs. (Goal 3-Objective 4)

### **June, 2004**

- Results of study to identify better project evaluation tools. (Goal 8-Objective 1)

**FY 2002-03 Strategic Plan  
Action Plans**

**GOAL 1: Increase the impact of the training provided through ETP funds on California's economy.**

**OBJECTIVE 1:** Through collaboration with ETP marketing partners, target basic industries by region, i.e., the manufacturing and high technology services sectors (e.g., computer programming and network design; software development; and multimedia/entertainment).

This objective supports ETP's mission to retain businesses that promote a healthy economy, and California's ability to successfully compete in a global economy, by promoting the value of training and partnering with other entities. Basic industries are ETP's primary focus, and manufacturing and high technology are the industries with the most impact on the economy. It is strategic to target specific industries within these large industry sectors, by region, to maximize the impact of funds invested in each region of the State, according to the growth patterns in those regions.

**TASKS/MILESTONES:**

1. Identify, coordinate and monitor actions by marketing partners. (Marketing Unit)
2. Inform partners of targeted areas for funding. (Marketing Unit)
3. Develop method for reporting and assessing targeting success. (Marketing, P &R, Fiscal, and Information Technology Units)
4. Ensure identification of industries and regions. (Contract Review Unit)

**RESOURCES:**

Marketing Unit has lead for this objective, and is supported by the CRU, ITU, Fiscal and P&R Units.

It is estimated that the following resources will be required to accomplish this objective in FY 2002-03: Marketing (.50 PYs); CRU (.12 PYs); ITU (.12 PYs); Fiscal (.08 PYs); P&R (.12 PYs).

**TIMELINES:**

1. Prepare RFP to obtain marketing partners, beginning 11/02.
2. Establish marketing goals by region and set targets for marketers by 1/03.
3. Begin capturing industry and region data 1/1/03.
4. Report on achieved targets 6/15/03.

**OVERALL RESULT:**

By 6/30/03, as a result of achieving this objective, it is intended that funding for basic industries will increase in the regions for which they are targeted growth industries. Since there is no baseline information yet, a baseline level will be set by June 2003, and targets set in the following year for each regional industry, and for overall number of industry-region specific contracts approved.

**FY 2002-03 Strategic Plan  
Action Plans**

**GOAL 1: Increase the impact of the training provided through ETP funds on California's economy.**

**OBJECTIVE 2: Increase Economic Development category funds approved for manufacturing and high technology by 10 percent, for businesses in basic industries (e.g., computer programming and network design; software development; and multimedia/entertainment).**

This objective also supports ETP's mission to retain businesses that promote a healthy economy, and successfully compete. Basic industries are ETP's primary focus, and manufacturing and high technology are the industries with the most impact on the economy.

**TASKS/MILESTONES:**

1. Increase marketing for manufacturing and high technology projects, using performance-based contracts with marketing partners. (Marketing Unit)
2. Measure and determine whether baseline 65% of Economic Development funds have increased for manufacturing and high technology projects approved. (Fiscal and P&R Units)

**RESOURCES:**

Marketing Unit has lead for this objective, and is supported by Fiscal, Monitoring, Development, ITU, and P&R Units.

It is estimated that the following resources will be required to accomplish this objective in FY 2002/03: Marketing Unit (.01 PYs); Fiscal Unit (.04 PYs); P&R (.08 PYs).

In addition to the tasks shown above, staff will propose future Strategic Plan objectives including exploring automation of industry reporting and assessment, and increasing technical assistance and site visits to potential contractors proposing training in manufacturing and high technology.

It is estimated that in FY 2003/04, the following resources will be needed: Marketing (.02 PYs); Monitoring (.02 PYs); Development (.15 PYs); Fiscal (.02 PYs); P&R (.14 PYs); ITU (.15 PYs).

**TIMELINES:**

1. Increased marketing to manufacturing and high technology industries beginning when marketers are selected (2/03).
2. Report on industry training percentages on 12/31/02 and 6/15/03.

**OVERALL RESULT:**

By 6/30/03, as a result of accomplishing this objective, it is intended that at least 71.5 percent of Economic Development funds approved in the Economic Development category will be for manufacturing and high technology.



**FY 2002-03 Strategic Plan  
Action Plans**

**GOAL 1: Increase the impact of the training provided through ETP funds on California's economy.**

**OBJECTIVE 3:** Target up to 10 percent of available Economic Development funds for training and employment of unemployed workers in occupations where employer demand exists, for secure employment, and upward job mobility.

Training unemployed workers for well paying, secure jobs is a vital part of ETP's mission, and filling the employer demand for skilled workers helps businesses to compete in the global economy.

**TASKS/MILESTONES:**

1. Measure and report on amount approved for new hires. (P&R Unit)
2. Work to increase number of new businesses in California by participating in training new employees. Target at least 6 approved contracts with new businesses or businesses relocating to California for FY 2002-03. (Marketing and Development Units)
3. Assess and recommend occupations best suited for new hire training. (P&R Unit)

**RESOURCES:**

Marketing Unit has lead for this objective, and is supported by Development, and P&R Units.

It is estimated that the following resources will be required to accomplish this objective: Marketing Unit (.04 PYs); Development Unit (.02 PYs); P&R (.04 PYs).

**TIMELINES:**

1. New hire project approval reporting - 07/02 through 06/03.
2. Develop contracts for new hire training projects - 07/02 through 06/03.
3. Make recommendations to Panel on "best" occupations for new hire projects – 04/03.

**OVERALL RESULT:**

By 6/30/03, as a result of accomplishing this objective, it is intended that up to \$7.8 million will be approved for new hire training, and at least 6 agreements be written with new or expanding businesses in the State by June 2003.

**FY 2002-03 Strategic Plan  
Action Plans**

**GOAL 1: Increase the impact of the training provided through ETP funds on California's economy.**

**OBJECTIVE 4: Target up to 10 percent of available funds for Special Employment Training (SET) projects to support growth industries that do not have out-of state competition – i.e., construction, health care, and research and development.**

This objective supports ETP's emphasis on serving businesses employing frontline workers in industries not eligible for funding under the regular program criteria. Except for working poor trainees in those projects falling under the high unemployment area or trainees in multiple barrier categories, these workers earn high wages and are highly skilled. Potential industries identified in the Plan are: North Hollywood – tourism, construction; San Mateo – Computer services; San Diego – Telecommunications; Sacramento – Distribution, consulting, legal services. Additional industries will be identified and targeted.

**TASKS/MILESTONES:**

1. Identify growth sectors, by region, for potential SET funding. (P&R Unit)
2. Track progress funding SET projects. (P&R Unit)
3. ETP Marketing staff reaches out to identified growth sectors. (Marketing Unit)
4. Marketing efforts are coordinated with Development staff for project development. (Marketing and Development Units)

**RESOURCES:**

Marketing Unit has lead for this objective, and is supported by the P&R and Development Units

It is estimated that the following resources will be required to accomplish this objective in FY 2002-03: Marketing (.04 PYs); P&R (.08 PYs); Development (.04 PY's).

**TIMELINES:**

1. Report on level of SET funding on monthly basis, beginning 8/02.
2. Identify business growth sectors offering high-wage, secure employment, or critical for economic development in high unemployment areas by 5/1/03.
3. Marketing outreach to growth sectors, beginning 7/03.
4. Report on progress of marketing to growth sectors quarterly, beginning 10/03.

**OVERALL RESULT:**

As a result of accomplishing this objective, it is intended that, a) by June 30, 2003, up to \$8.64 million be approved for construction, health care, research & development, and other SET projects; and b) by July 1, 2003, targeted marketing to identified growth sectors will be initiated.

**FY 2002-03 Strategic Plan  
Action Plans**

**GOAL 1: Increase the impact of the training provided through ETP funds on California's economy.**

**OBJECTIVE 5a: Initiate independent study to determine the impact of ETP-funded training on businesses' viability and to assess the level of employer supported training.**

This objective supports all of the components of ETP's mission, in that the study results will give the Panel valuable information with which to improve ETP's performance and target future funding.

**TASKS/MILESTONES:**

1. Survey employers on impact of training. (Monitoring Unit)
2. Solicit and obtain services of consultant to perform study of ETP's effectiveness. (P&R Unit)
3. Assess study results (submitted in February and December) for desirable policy/procedure changes. (P&R and Development Units)

**RESOURCES:**

The Planning & Research Unit has lead for this objective, and is supported by Development and Monitoring Units.

It is estimated that the following resources will be required to accomplish this objective: P&R (.25 PYs); Monitoring Unit (.50 PYs); Development Unit (.12 PYs). It will also require \$319,660 in marketing and research funds to reimburse the consultant. Of that amount, \$180,000 will be expended in 2002/03 and \$139,660 will be deferred until fiscal year 2003-04.

**TIMELINES:**

1. Continuous employer impact surveys in final monitoring reports to begin January 1, 2003.
2. Effectiveness study to be conducted from October 2002 to December 2003.
3. Implementation of approved recommendations in February 2004.

**OVERALL RESULT:**

As a result of accomplishing this objective, by February 2004, ETP will identify new recommendations for better ways to maximize the impact of ETP training, and the level of employer support for workforce development in California.

**FY 2002-03 Strategic Plan  
Action Plans**

**GOAL 1: Increase the impact of the training provided through ETP funds on California's economy.**

**OBJECTIVE 5b: Initiate independent study to determine the effectiveness of ETP-funded Career Ladder training.**

This objective will improve ETP's ability to fund career ladder projects to help low skill workers obtain better jobs that pay higher wages. Supporting career ladder development is a priority established in ETP's authorizing statute, but this is the first study to identify the best ways to promote better career opportunities for workers through employment-based training investments.

**TASKS/MILESTONES:**

1. Survey Career Ladder trainees for effectiveness of training. (Monitoring Unit)
2. Solicit and obtain services of consultant to perform Career Ladder Study. (P&R and Development Units)

**RESOURCES:**

The Planning & Research Unit has lead for this objective, and is supported by Development and Monitoring Units.

It is estimated that the following resources will be required to accomplish this objective in FY 2002/03: P&R (.12 PYs); Monitoring (.50 PYs); Exec Staff (0.12 PYs) (Additional oversight and support will be provided by the Assistant Director, as part of the special projects assignment.)

In FY 2003/04, .16 PYs will be needed for P&R to monitor and assess the findings of the study.

**TIMELINES:**

1. Continuous employer impact surveys in final monitoring reports to begin January 1, 2003.
2. RFP process from December 2002 through March 2003.
3. Study is conducted; with final results provided April 2004.
4. Recommendations approved; changes implemented by July 2004.

**OVERALL RESULT:**

By July 2004, as a result of accomplishing this objective, the Panel will build upon and enhance training designed to promote secure, high-wage career opportunities for California workers, using ETP funds.

**FY 2002-03 Strategic Plan  
Action Plans**

**GOAL 1: Increase the impact of the training provided through ETP funds on California's economy.**

**OBJECTIVE 6: Support industry based workforce development needs, through funding support for Techforce, and Career Ladder initiatives.**

**OBJECTIVE 7: Target up to \$5 million to support the Governor's Nurse Workforce Initiative efforts for career paths and workforce preceptorships (mentors).**

These objectives support ETP's mission to help businesses compete in the global economy successfully, and to provide workers with good jobs, and meet employer demand for skilled workers. Targeted workforce training investments are also consistent with State government goals for improving the availability of well trained workers in critical industries.

**TASKS/MILESTONES:**

1. Refine procedures, and develop contracts for Career Ladder and Techforce projects. (P&R, Development, Legal and Marketing Units)
2. Develop mentoring policy. (Legal and P&R Units)
3. Measure funding levels of Techforce, Career Ladder and nurse training projects. (P&R and Marketing Units)

**RESOURCES:**

The Marketing Unit has lead for this objective, and is supported by Development, Legal and P&R Units.

It is estimated that the following resources will be required to accomplish this objective: Marketing (.25 PYs); Legal Unit (.12 PYs); Development Unit (.25 PYs); P&R (.25 PYs).

**TIMELINES:**

1. Procedures developed from July through February 2003.
2. Mentoring policy for nurse training considered by the Panel in May 2003.
3. Report on funding levels and number of specified projects in Annual Report for FY 2002-03.

**OVERALL RESULT:**

As a result of accomplishing these objectives, it is intended that up to \$10 million will be approved for effective, high -impact Techforce and Career Ladder projects, and \$5 million on strategic nurse training projects by June 2003.

**FY 2002-03 Strategic Plan  
Action Plans**

**GOAL 1: Increase the impact of the training provided through ETP funds on California's economy.**

**OBJECTIVE 8: Ensure ETP funds act as a catalyst for workforce training investments by businesses. (Deferred objective – subject to reconsideration in 2003-04 Strategic Plan.)**

This objective supports the intent of ETP's enabling legislation that ETP serve as a catalyst for businesses to invest in training their employees. It a) re-enforces the current requirement that employers bear a part of the cost of training funded by ETP, and b) seeks to initiate activities to help stimulate employer-provided training, separately from ETP.

**TASKS/MILESTONES:**

It is recommended this objective be deferred, given lack of staff resources. However, once resources become available:

1. Prepare materials to educate customers on purpose of seed funding, and to promote the benefits of employer-provided training. (Marketing Unit)
2. Require employers to certify in-kind contributions and identify planned future employer-funded training. (P&R, Development, Monitoring, and CRU)
3. Conduct follow-up study of in-kind contributions and employers' training budgets.

**RESOURCES:**

Planning & Research has lead for this objective, and is supported by Development, Monitoring, Marketing, Audits and CRU.

It is estimated that the following resources would be required to accomplish this objective when it is undertaken: P&R (.14 PYs); Development Unit (.25 PYs); Marketing (.12 PYs); CRU (.25 PYs); Monitoring (0.25 PYs); Audits (.25 PYs).

However, additional staff resources will be needed before this objective can be achieved.

**TIMELINES:**

1. Seek additional resources through BCP process in September 2003.
2. If additional resources are available in 2003-04, initiate tasks 1, 2, and 3 above in 2004.

**OVERALL RESULT:**

While this objective is recommended for deferral, it is intended that a) at least a 100 percent employer contribution rate will be reached, after it is implemented, b) employers will maintain the same or a higher level of training after ETP funding, and c) the concept of employer-provided training will be formally promoted to California employers.

**FY 2002-03 Strategic Plan  
Action Plans**

**GOAL 1: Increase the impact of the training provided through ETP funds on California's economy.**

**OBJECTIVE 9: Increase the number of persons trained under projects that support joint labor employer training ventures.**

This objective supports the intent of the enabling legislation that ETP is a joint labor-management program, and it puts emphasis on partnerships between business and labor, and promoting the value of training.

**TASKS/MILESTONES:**

1. Assist contractors to implement joint training projects with unions, through increased outreach. (Development and Monitoring Units)
2. Use marketing partner to reach labor affiliated companies. (Marketing Unit)
3. Measure number joint union-employer training program and level of union funding. (P&R Unit)

**RESOURCES:**

The Marketing Unit has lead for this objective, and is supported by Development, Monitoring and P&R Units.

It is estimated that the following resources will be required to accomplish this objective in FY 2002/03: Marketing (.02 PYs); Development Unit (.25 PYs); P&R (.25 PYs); Monitoring (.12 PYs); Executive Staff (.25 PYs). (The Executive Team will augment line staff through outreach and project development activities.)

In addition to the tasks shown above, staff will defer outreach to unions to obtain financial partnerships, and modification of data systems for reporting on union trainees, until additional resources are secured. The deferred activities will require .25 PYs for marketing, and .25 PYs for ITU staff.

**TIMELINES:**

1. Implementation of joint projects is ongoing.
2. Marketing contract developed and approved from January through May 2003.
3. Determine funding levels/percentages of union trainees in ETP contracts by June 2003.
4. Re-evaluate and refine objective for FY 2003-04 Plan by June 2003.
5. Seek additional resources through BCP process in September 2003.

**OVERALL RESULT:**

As a result of accomplishing this objective, it is intended that, by June 2003: a) a marketing contract will be established to help promote projects that support joint labor union-employer training ventures; and b) a baseline will be established, regarding the percentage of union employees trained in ETP contracts, in order to set a specific objective in next year's updated Strategic Plan.

**FY 2002-03 Strategic Plan  
Action Plans**

**GOAL 2: Increase participation in ETP and workforce training in target industries.**

**OBJECTIVE 1: Increase participation in employment training through marketing, public relations and outreach, in coordination with marketing partners and other stakeholders with access to target industries.**

This objective supports the Panel's successful collaboration with business, labor and other public entities. ETP will continue to work in conjunction with its partners in the economic development and workforce development community to increase public familiarity with ETP, and to increase the number of contracts from specific industries and regional targets.

**TASKS/MILESTONES:**

1. ETP marketing partners link with target industry associations to publicize ETP. (Marketing)
2. Survey contractors who have withdrawn training requests in order to develop tools to improve participation with target industries. (P&R)
3. ETP website is enhanced to promote employer-funded training. (Marketing, P&R, ITU)

**RESOURCES:**

Marketing Unit will have lead for this objective, with support from P&R, ITU, and ETP Executive Team for outreach initiative.

It is estimated that the following resources will be required to accomplish this objective in FY 2002/03: Marketing (.10 PYs); P&R (.20 PYs); ITU (.02 PYs) Executive Team (.5 PYs).

Beginning in December 2002, the Executive Team (the Executive Director and two Assistant Executive Directors) will initiate an outreach effort to ETP's government, business and labor partners designed to increase awareness about the ETP program in general.

**TIMELINES:**

1. ETP marketing reports on publicity results quarterly.
2. ETP Executive Team begins outreach Initiative in December 2002.
3. Implementation of surveys of withdrawn training requests in March 2003.
4. ETP website enhancements developed and completed from November through December 2002.

**OVERALL RESULT:**

As a result of achieving this objective, it is intended that an increased number of targeted businesses will be contacted by June 2003 and provide fiscal and other assistance to encourage expanded industry training initiatives.

Through the Executive Team outreach initiatives, ETP will expand awareness of ETP by other workforce and economic development stakeholders. Emphasis will focus on identifying new opportunities to promote workforce and economic development through strategic collaborative initiatives, expand and improve current and past collaboratives, and leverage better statewide and regional economic and workforce development initiatives.



**FY 2002-03 Strategic Plan  
Action Plans**

**GOAL 2: Increase participation in ETP and workforce training in target industries.**

**OBJECTIVE 2: Develop performance-based marketing contracts that reward improved achievement of marketing goals, while creating a seamless interaction with ETP's operation.**

This objective would optimize the Panel's collaboration with partners in the economic development and workforce development community, increasing public familiarity with ETP and contracts from specific industries and regional targets.

**TASKS/MILESTONES:**

1. Determine marketing strategy, identifying appropriate marketing organizations for target industries. (Marketing Unit)
2. Complete RFP process, and develop performance-based contracts to achieve marketing goals. (Marketing and Legal Units)
3. Assess contract performance in meeting marketing goals. (Marketing Unit)

**RESOURCES:**

The Marketing Unit is the lead unit in for this initiative with support from Legal and the Executive Team, which will work to improve communications and effective use of marketing resources.

It is estimated that the following resources will be required to accomplish this objective in FY 2002/03: Marketing (.50 PYs); Legal (.01 PYs); Executive Team (.25 PYs).

**TIMELINES:**

1. Marketing strategy developed from July through August 2002.
2. RFP process from August 2002 through January 2003.
3. Contracts executed in March 2003.
4. Contract performance assessed in June, September, and December 2003.

**OVERALL RESULT:**

As a result of achieving this objective, it is intended that all of Marketing's goals will be reached by June 2003.

By raising the awareness of marketing agents of ETP program requirements and Panel goals/objectives more seamless problem-free marketing and development of projects should be achieved. Marketers performance and interaction with ETP development/monitoring staff will be tracked and adherence to contract requirement enforced to ensure this outcome is achieved. Efforts to increase communication and improve interaction between marketers and ETP will be assessed and refined on a continuous basis.

**FY 2002-03 Strategic Plan  
Action Plans**

**GOAL 2: Increase participation in ETP and workforce training in target industries.**

**OBJECTIVE 3: Market special projects as part of the Labor and Workforce Development Agency, and other workforce partnership initiatives.**

This objective supports ETP's efforts to collaborate with business, labor, and other organizations in order to further workforce training and to ensure adequate delivery of industry-based training as part of the programs undertaken by the LWDA.

**TASKS/MILESTONES:**

1. The Executive Director will lead an LWDA work group to expand outreach to key stakeholders and special needs workforce development populations beginning in 1/03.
2. Attend weekly LWDA staff meetings and report on ETP initiatives.
3. Prepare a written report on ETP activity weekly for inclusion in the LWDA report to the Governor.
4. Prepare and submit Budget Change Proposals (BCP), and regulatory changes for LWDA approval.

**RESOURCES:**

Executive staff will provide leadership and inter-agency coordination. (.05 PYs)

The Marketing Unit would have lead for this objective, with support from P&R. (.25 PYs)

The Fiscal Unit will provide support for BCP development. (.1 PYs)

Legal Unit will develop regulatory changes as needed (.05 PYs).

**TIMELINES:**

1. BCP to address ETF shortfall submitted to LWDA and Department of Finance (DOF) in 9/02.
2. LWDA adopts a plan for workgroup to expand outreach efforts in 10/02.
3. LWDA Secretary approves membership of workgroup to be lead by ETP Executive Director.
4. LWDA outreach efforts workgroup initiate meetings in 1/03.
5. Weekly meeting with LWDA Secretary and written reports on ETP activities throughout FY 2002-03.

**OVERALL RESULTS:**

1. The ETP Executive Director leads LWDA workgroup in the initial task of categorizing and prioritizing outreach, marketing, and communication efforts by programs within LWDA. It will also be charged with ensuring the effectiveness of those efforts and making recommendations over the course of this fiscal year.
2. Weekly meetings and reports with LWDA Secretary and other LWDA Executive staff contribute to greater communication and leadership by ETP on economic and worksite-based workforce development initiatives.
3. BCPs will secure funding for ETP in the current and future budget years to insure effective delivery of State sponsored industry-based workforce development as an important and significant part of the LWDA.

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**GOAL 2: Increase participation in ETP and workforce training in target industries.**

**OBJECTIVE 4: Convene meetings with contractors and consultants who market ETP programs, to share information and targeting strategies.**

This objective would support the Panel's efforts to identify and target industries for ETP funding and to identify ways to more effectively carry out ETP's mission.

**TASKS/MILESTONES:**

1. Hold two meetings with participation from marketers, training consultants, labor organizations, and businesses to assess ways to implement and improve SOST process within ETP.
2. Attend workforce development -related events to initiate dialogue with ETP partners and stakeholders.
3. Hold a Strategic Planning work session to identify goals and objectives for inclusion in the 2003-04 Strategic Plan.

**RESOURCES:**

P&R will be the lead unit for this objective, with support from Marketing, Legal, Administration, and Development Units, and ETP Executive Team (for outreach to stakeholders). It is estimated that the following resources will be required to accomplish this objective: P&R (.5 PYs); Executive Team (.25 PYs); Marketing (.25 PYs); Legal (.01 PYs); Administration (.01 PYs); and Development (0.1 PYs).

**TIMELINES:**

1. First SOST meeting in Northern California in October, 2002.
2. Second SOST meeting in Southern California in November, 2002.
3. Staff submits a recommendation on SOST February, 2003.
4. In coordination with the Alliance and other interested parties, attend and participate in meetings with stakeholder community, as necessary. ETP staff attended the August 2002 Alliance for ETP Meeting and intends to continue participating at Alliance meetings as requested.
5. Hold Strategic Plan work session April, 2003.

**OVERALL RESULTS:**

1. Identification of best practice approach to ETP funded SOST. This may include elimination of SOST if no mechanism is identified, which the Panel feels will address past SOST issues.
2. ETP outreach to stakeholders and partners will facilitate constant improvement to the ETP program and will secure support for ETP among partners and stakeholders.
3. Provide a forum to address and discuss opportunities and challenge in regard to economic and workforce development leading to the adoption of an updated ETP Strategic Plan for FY 2003-04.

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**GOAL 3: Assist contractors to increase the success rate among projects selected for funding.**

**OBJECTIVE 1: Maintain a disencumbrance rate of 25 percent or less.**

This objective supports the Panel's continued efforts to improve training project performance and, thereby, reduce disencumbrance rates which historically have averaged as much as 40 percent annually.

**TASKS/MILESTONES:**

1. Track disencumbrance rate monthly. (Fiscal Unit)
2. Continually assess contract performance. (Monitoring Unit)
3. Refine or develop tools for improved project performance, based on assessments, (i.e., improve technical assistance and early intervention). (P&R, Monitoring, Development and Fiscal Units)

**RESOURCES:**

The Fiscal Unit will track disencumbrances. Monitoring will have the lead responsibility for assessing project performance. Planning and Research will work in conjunction with Monitoring/Development to develop tools for improved project performance.

It is estimated that the following resources will be required to accomplish this objective in FY 2002/03: Fiscal (0.25 PYs); Development/Monitoring (0.10 PYs); P&R (0.10 PYs).

**TIMELINES:**

1. Prepare disencumbrance reports - monthly.
2. Assess contract performance - ongoing.
3. Develop tools for improved project performance to Panel by July 2003.

**OVERALL RESULT:**

It is intended that by undertaking this objective, the Panel will continue a disencumbrance rate of 25 percent or less by 6/30/03, and for each succeeding fiscal year.

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**GOAL 3: Assist contractors to increase the success rate among projects selected for funding.**

**OBJECTIVE 2: Evaluate the incremental system of encumbering funds to determine if its objective is being met, and to determine opportunities to further minimize training fund disencumbrances. (Deferred Objective – subject to reconsideration in 2003-04 Strategic Plan.)**

This objective would optimize Panel's efforts to control the level of training funds that are encumbered but not earned. Given current staff resource constraints, it is recommended that work on this objective be postponed until FY03-04.

**TASKS/MILESTONES:**

1. Design evaluation methodology. (Planning and Research)
2. Conduct evaluation of incremental system of encumbrances, including review of project disencumbrance levels from previous fiscal years. (Planning and Research, Fiscal, and Development)
3. Implement recommendations to improve system of disencumbrances. (Planning and Research, Fiscal, and Development)
4. Report on evaluation results in Annual Report for FY2003-04. (Planning and Research)

**RESOURCES:**

The Planning and Research Unit would have lead for this objective (.4 PYs) , assisted by the Fiscal (.1 PY) and Development Units (.1 PYs).

Additional resources need to be secured before this objective can be undertaken. This objective should be considered among the objectives to be undertaken with FY2003-004 staff resources.

**TIMELINES:**

1. Work plan and methodology approved by July 7, 2003.
2. Recommendations for optimal encumbrance factors and final report completed by December 31, 2003.
3. New policies, procedures and regulations are disseminated to staff with training as needed by March 1, 2004.
4. Annual Report issued with disencumbrance results by November 30, 2004.

**OVERALL RESULTS:**

Deferring work in this objective until next fiscal year will allow staff to complete other strategic plan goals and objectives –freeing resources that can be assigned to this task in FY2003-04. The long-term result from completing this task would be more successful projects with less money being disencumbered and re-encumbered for other training initiatives. This would

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**GOAL 3: Assist contractors to increase the success rate among projects selected for funding.**

increase the effectiveness of individual training initiatives and reduce the risk of ETP funds being redistributed to other programs in times of fiscal shortages.

**OBJECTIVE 3: Complete implementation of seamless development and monitoring in all ETP regional offices.**

This objective supports ETP efforts to provide improved service to customers, helping contractors to meet their training goals.

**TASKS/MILESTONES:**

1. Complete training of staff on new process in San Diego and North Hollywood offices.
2. Evaluate staff training.
3. Evaluate and refine new development/monitoring process.
4. Train staff statewide for full implementation.
5. Implement new process in all regional offices.

**RESOURCES:**

Development and Monitoring will have lead for this objective: providing staff training, evaluating performance; and refining process. Administration staff will survey staff on the training they receive.

It is estimated that the following resources will be required to accomplish this objective in FY 2002/03: Development /Monitoring (11 PYs), and Administration (0.25 PYs).

**TIMELINES:**

1. Survey completed on trained staff by 9/16/02.
2. Complete staff training on new process in SD and NH by 1/1/03.
3. Evaluate and refine new process by 6/03/03
4. Implement improved process statewide by 10/01/03.

**OVERALL RESULT:**

As a result of achieving this objective, it is intended that seamless development and monitoring will be implemented in all regional offices by 10/1/03.

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**GOAL 3: Assist contractors to increase the success rate among projects selected for funding.**

**OBJECTIVE 4: Explore new methods of assessing the value added by ETP training programs. (Deferred Objective – subject to reconsideration in 2003-04 Strategic Plan.)**

This objective would optimize Panel efforts to ensure that training benefits trainees, participating businesses, and the California economy – providing workers with high wage, high skill jobs; and providing employers with a skilled workforce to ensure they can compete in national and international markets. However, given current resource constraints, it is recommended that this objective be deferred until FY2003-04.

**TASKS/MILESTONES:**

1. Taking into consideration the results of (1) the ETP Effectiveness Study (See Goal 1, Objective 5) and (2) Project Evaluation Tools Study (See Goal 8, Objective 1), design methodology to further assess the value of ETP training to employers and the economy of ETP training. (Planning and Research, Development, and Monitoring)
2. Conduct evaluations of the value of training. (Planning and Research, Monitoring)
3. Implement recommendations resulting from study. (Planning and Research, Development, Contract Review, and Monitoring)
4. CRU begins reviewing projects for compliance with new project criteria established per study. (Contract Review).
5. Report results of assessment in Annual Report for FY2003-04.

**RESOURCES:**

The Planning and Research Unit would have lead for this objective, with the assistance of Development, Monitoring, and Contract Review.

It is estimated that the following resources would be required to accomplish this objective, when the study is undertaken: P&R (0.25 PYs); Development (0.1 PYs); Monitoring (0.1 PYs); CRU (0.1 PYs). Additional resources need to be secured before this objective can be undertaken (BCP approval).

**TIMELINES:**

1. Methods to assess value of ETP training are developed and approved by February 2004.
2. Study findings and recommendations are presented by May 2004.
3. Policy and procedures are implemented.
4. Contract Review Unit checklist revised to incorporate new project criteria, and staff trained in value assessment by October 1, 2004.
5. Annual Report issued containing value assessment by November 1, 2004.

**OVERALL RESULTS:**

A reliable tool for measuring the value of training to business and the workforce (individuals, occupations) may assist the Panel (1) in determining the appropriate level of required employer contributions towards training, and (2) to set more precise goals for training investments in California businesses and industries.

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**GOAL 4: Increase the amount of Employment Training Tax (ETT) funds available for qualified ETP proposals.**

**OBJECTIVE 1: Increase the Budget Act appropriation to the ETP program in the 2003-04 budget year by eliminating diversions from the Employment Training Fund to non-Labor and Workforce Development Agency (LWDA) programs.**

**OBJECTIVE 2: Use increased funding to address:**

- **Critical workforce needs identified by the Labor and Workforce Development Agency and the Panel;**
- **Increase employer-labor training initiatives;**
- **Expand the number of companies with effective and sustainable workforce development programs.**

These objectives support the intent of the enabling legislation that the Employment Training Fund (ETF) support training programs for the businesses that pay the Employment Training Tax (ETT). ETP's mission is to promote the value of employee training.

**TASKS/MILESTONES:**

1. Seek Budget Change Proposal (BCP) approval from the LWDA to proceed with requests. (P&R Unit)
2. Request additional dollars via BCP submitted to Department of Finance (DOF), for redirection of ETF appropriation from Department of Social Services (DSS) back to ETP, and to collect pro rata share of ETF shortfall by affected programs. (P&R and Fiscal Units)
3. Request position authority from DOF for workload increases associated with requests. (P&R)
4. Obtain final approvals from DOF. (P&R Unit)
5. Legislative Budget Committee hearings/Governor's consideration. (Executive Staff; P&R)
6. Develop new duty statements and procedures to reflect new activities. (Administration, P&R, Development, Monitoring, Marketing, and Audit Units)
7. Hire and train new staff. (Administration, P&R, Development, Monitoring, Marketing, Audits)
8. Survey customers and other employers to determine extent of company training programs. (P&R Unit)

**RESOURCES:**

The Executive Staff has the primary responsibility for the objective and will be provided assistance by the P&R, Fiscal, Development, Monitoring, Marketing, Audits, and Administration Units. It is estimated that the following resources will be required to accomplish this objective in FY 2002-03: Executive Staff (.01 PYs); P&R (.25 PYs); Fiscal (.01).

The following resources will be required in FY 2003/04: Executive (0.01 PYs); Marketing (0.25 PYs); P&R (0.1 PYs); Fiscal (0.1 PYs); Development (0.1PYs); Monitoring (0.1PYs); Audit (0.1 PYs); Administration (0.1 PYs).



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**GOAL 4: Increase the amount of Employment Training Tax (ETT) funds available for qualified ETP proposals.**

**(OBJECTIVES 1 and 2 Continued)**

**TIMELINES:**

1. The BCPs were approved by LWDA and forwarded to DOF by 10/11/02.
2. Decisions from DOF are anticipated by January 2003.
3. If DOF approves the requests, consideration by the Legislative Budget Committees and the Governor will follow in Spring, 2003.
4. After authority received, duties and procedures developed from June to October 2003.
5. Staff hired and trained from November to December 2003.
6. Survey conducted from November to December 2003.

**OVERALL RESULT:**

As a result of accomplishing these objectives, it is intended that a) ETF funds transferred to DSS for CalWorks will revert to ETP for use in training projects, and b) ETF shortfall in 2001-02, 2002-03, and 2003-04 will be resolved, and that the additional funding to ETP will be used to promote employee training.

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**GOAL 5: Leverage funds from the private sector in support of employer-provided training.**

**OBJECTIVE 1: Strengthen contracting requirements to ensure that ETP funding will be used to supplement training provided by a company during the normal course of business.**

This objective supports ETP's ability to leverage funds from business and industry sources to ensure worker training resources are maximized and supplemented by business.

**TASKS/MILESTONES:**

1. Review supplemental training issue, conducting work sessions with contractors and staff for public feedback. (P & R, Executive Staff)
2. Draft assessment of issues and proposed recommendation (including new/revised regulations) for Panel approval. (Legal, P & R)
3. Adopt procedures and implement new guidelines. (P&R, Development, CRU)
4. Measure impact on program, and report to Panel on outcome. (P&R)

**RESOURCES:**

The Planning and Research Unit would have lead for this objective, with assistance from Development, Legal, Executive Staff, and CRU.

It is estimated that the following resources would be required to accomplish this objective when it is undertaken: P&R (0.25 PYs); Development (0.1 PYs); Legal (0.1 PYs); CRU (0.1 PYs) Executive Staff (.01 PYs)

**TIMELINES:**

1. Memo summarizing review of issues by 2/28/03.
2. Conduct work sessions with contractors and staff on supplemental issues by 4/30/03.
3. Present recommendation for Panel approval by 5/31/03.
4. Implement new procedures/guidelines by 7/1/03.
5. Report back to Panel.

**OVERALL RESULT:**

As a result of this objective, legislative requirements will be clarified, giving a clear definition of supplemental training (i.e., is it supplemental to existing training curriculum, or supplemental to other possible funding sources). Also, SOST, future employer training plans, and apprenticeship training will be evaluated and given clear parameters for application to projects in relation to supplemental funds provided by ETP. This will be determined by July 1, 2003.

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**GOAL 5: Leverage funds from the private sector in support of employer-provided training.**

**OBJECTIVE 2: Increase employer contributions to the cost of training after completion of ETP-funded training. (Deferred Objective – subject to reconsideration in 2003-04 Strategic Plan.)**

This objective would reinforce employers' commitment to continuous workforce training and maximize Panel training funds. However, given current resource constraints, it is recommended that this objective be deferred until FY 2003/04.

**TASKS/MILESTONES:**

1. Explore methods of encouraging employers to continue training after completion of the ETP project.
2. Explore methods of encouraging employer-funded training for new hires after placement.
3. Propose recommendations to the Panel.
4. Implement approved changes.

**RESOURCES:**

Planning and Research Unit would have lead for this objective, assisted by Development and Monitoring.

It is estimated that the following resources would be required to accomplish this objective when it is undertaken: P&R (0.25 PYs); Development (0.25 PYs); Monitoring (0.25 PYs); CRU (0.1 PYs)

Additional resources would need to be secured before this objective could be undertaken (BCP approval).

**TIMELINES:**

1. Exploration of new methods from July to September 2003.
2. Recommendations presented September 2003.
3. Implementation begins October 2003.

**OVERALL RESULTS:**

As of November 2003, as a result of accomplishing this objective, it is intended that employers will continue training their workers, subsequent to their participation in ETP funded training.

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**GOAL 6: Ensure that ETP funds continue to be invested in projects that target high-wage jobs, produce above average salary increases, and above average job retention rates.**

**OBJECTIVE 1:** Seek to have at least 95 percent of ETP trainees remain employed in the same occupation or industry for which they were trained, one year after completing training and employment retention.

**OBJECTIVE 2:** Strive to have at least 90 percent of ETP trainees remain employed in the same occupation or industry for which they were trained, three years after completing training and employment retention.

**OBJECTIVE 3:** Target training funds to employers that endeavor to increase trainees' wages, on average, by at least 10 percent one year after completing training and employment retention.

These objectives relate directly to providing workers with good (secure) jobs that pay good wages.

**TASKS/MILESTONES:**

1. Continue current efforts in negotiating training agreements to ensure training is employer driven and customized, and leads to high-wage employment in secure jobs.
2. Increase efforts to identify opportunities for wage increases through approval of strategic workforce training projects.
3. Conduct study to evaluate success in achieving these three objectives.

**RESOURCES:**

The P&R Unit will have the lead for these objectives, with assistance from Development, Monitoring, Marketing, and CRU Units.

It is estimated that the following resources would be required to accomplish these objectives when they are undertaken: P&R (0.4PYs); Development (0.2 PYs); Marketing (0.2 PYs); Monitoring (0.1PYs); CRU (0.1PYs).

**TIMELINES:**

1. Update staff contract development guidelines to clarify/emphasize focusing on these objectives in contract development and implementation by 2/03.
2. In fiscal year 2003-04, initiate study to evaluate ETP success in raising wages and promoting secure employment.
3. Evaluate study findings and propose policy and program improvements, as appropriate in FY 2004-05.

**OVERALL RESULT:**

Achieving this objective will enable the Panel to better determine if it is funding training that leads to high-wage, secure jobs.

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**GOAL 6: Ensure that ETP funds continue to be invested in projects that target high-wage jobs, produce above average salary increases, and above average job retention rates.**

**OBJECTIVE 4: Use ETP training assistance to leverage reduced workforce turnover, with the objective of an overall turnover rate under 20 percent. (Deferred Objective – subject to reconsideration in 2003-04 Strategic Plan.)**

This objective also relates directly to providing workers with good (secure) jobs that pay good wages.

**TASKS/MILESTONES:**

1. Inform contractors of this objective prior to and during the contract development process.
2. Develop a system to track contractors turnover rate prior to training and during the last year of their ETP contract. Utilize data to monitor contractors' compliance with turnover requirements in current agreements and to provide the Panel turnover information as they consider approval of projects for repeat Contractors.
3. Explore possibility of rewarding contractors who maintain low turnover rates, with repeat contracts having reduced substantial contributions or other incentives, and linking contract reimbursement with compliance to turnover requirements.

**RESOURCES:**

The P&R Unit and Development would have leads for this objective, with assistance from Marketing, Monitoring, Fiscal, Audits, and ITU Units.

It is estimated that the following resources would be required to accomplish this objective when it is undertaken: P&R (0.25 PYs); Development (0.1 PYs); Marketing (0.1 PYs); Monitoring (0.1 PYs); Fiscal (0.1 PYs); Audits (0.1 PYs); ITU (0.1 PYs).

Additional resources must be secured before this objective can be undertaken.

**TIMELINES:**

1. On an on-going basis, provide information on turnover requirements/objectives at orientations, site visit and start-up meetings.
2. Develop a tracking mechanism to capture contractor turnover rates 1 year before ETP funding training and the 2<sup>nd</sup> year of the ETP contract, to be implemented by July 2003.
3. On a monthly basis, the Panel considers turnover data for all contracts presented for approval, beginning July 2003.
4. Complete memo addressing tracking system; rewards/incentives for low turnover contractors; possible linking of contract reimbursement with compliance to turnover requirements; and turnover-related issues is completed by October 2003.

**OVERALL RESULT:**

This objective will enable the Panel to target funds to train workers in secure jobs. Developing a mechanism to monitoring employer turnover rate will enable the Panel better implement its current turnover requirements and to explore incentives for rewarding contractors who maintain a low turnover rate.

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**GOAL 6: Ensure that ETP funds continue to be invested in projects that target high-wage jobs, produce above average salary increases, and above average job retention rates.**

**OBJECTIVE 5: Explore a limit for waivers to wage requirements for working poor and career ladder trainees at a maximum of 25 percent below the required ETP minimum wage.**

ETP seeks to provide workers with high-paying jobs, so limiting the reduction in wages paid for ETP trained jobs reinforces the emphasis on funding training for high-wage jobs.

**TASKS/MILESTONES:**

1. Revise or develop working poor and career ladder policies to provide limits on wage waivers. (P&R, and Development Units)
2. Measure and report on actual wage waiver percentages approved. (P&R)

**RESOURCES:**

The P&R Unit has lead for this objective, with assistance from the Development Unit.

It is estimated that the following resources will be required to accomplish this objective in FY 2002-03: P&R (.08 PYs); Development (.02 PYs).

**TIMELINES:**

1. Policies developed and proposed to Panel by January 2003.
2. Report on waivers revision impacts by June 2003.

**OVERALL RESULT:**

As a result of accomplishing this objective, it is intended that wages earned by funded working poor or career ladder trainees will stay above the State minimum wage. This should be effective by January 2003.

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**GOAL 6: Ensure that ETP funds continue to be invested in projects that target high-wage jobs, produce above average salary increases, and above average job retention rates.**

**OBJECTIVE 6: Increase the number of high-wage jobs filled by trainees benefiting from the ETP program.**

This objective also relates directly to providing workers with good jobs that pay good wages.

**TASKS/MILESTONES:**

1. Use marketing partners to market to high wage trade jobs and high skill manufacturing industries. (Marketing Unit)
2. Emphasize wage requirements to customers. (Marketing, Development, Monitoring, Fiscal, and Audit Units)
3. Expand the number of high wage placements, and collect data on high wage placements (i.e. number of employees impacted by ETP training, amount of salary increases obtained, cost of training, turnover rate of companies, etc.).

**RESOURCES:**

The Marketing Unit has the lead for this objective with assistance from Development, Monitoring, Fiscal and Audit Units.

It is estimated that the following resources will be required to accomplish this objective in FY 2002-03: Marketing (.04 PYs; Development (.02 PYs); Monitoring (.01 PYs); Fiscal (.01 PYs); Audits (.01 PYs).

Task #3 must be postponed until additional resources can be obtained.

**TIMELINES:**

1. Begin marketing (after partners are obtained) by January 2003.
2. Identify and focus on marketing to industries with high wage potential – ongoing.
3. Emphasis of wage requirements is ongoing.
4. Data collection will be postponed until needed resources are available.

**OVERALL RESULT:**

This objective will enable to the Panel to better target funds to expand the number of new hires placed in high wage jobs, and retrainees promoted to high wage jobs will increase.

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**GOAL 7: Reduce barriers to successful participation in the ETP program.**

**OBJECTIVE 1: Implement a pilot project to facilitate the ability of small businesses with 100 or fewer workers to contract directly with the Panel.**

This objective supports promotion of a healthy economy, as most California employers are small businesses, and it helps them to compete successfully. It seeks to facilitate small businesses' ability to contract directly with ETP for training funds.

**TASKS/MILESTONES:**

1. Initiate pilot small business project. (Special Projects, Development, Monitoring, and Marketing Units)
2. Develop procedures and systems to facilitate implementation of pilot. (Special Projects, Development, Monitoring, Fiscal, P&R, and ITU)
3. Solicit and select contractor to evaluate the small business pilot. (Special Projects, and P&R)
4. Evaluate report findings and implement changes, as needed. (Special Projects, P&R, Marketing, ARU, Development, Monitoring, Fiscal, Executive and ITU)

**RESOURCES:**

The Special Projects Unit has lead for this objective, with assistance from Executive Staff, Monitoring, Development, ARU, P&R, Marketing, ITU and Fiscal.

It is estimated that the following resources will be required to accomplish this objective: Special Projects (.75 PYs); P&R (.04 PYs); Monitoring (.25 PYs); Development (.50 PYs); ARU (.12 PYs); Marketing (.08 PYs); ITU (.04 PYs); Fiscal (.12 PYs); Executive (.23 PYs). Also an undetermined amount of money must be used from the Marketing and Research funds to obtain an independent evaluation, estimated at \$75,000.

**TIMELINES:**

1. Pilot project from August 2002 through August 2003.
2. Bid process to obtain evaluator from October 2002 through February 2003.
3. Conduct study of Small Business Pilot Project from February through September 2003.
4. Assess findings and implement approved changes from September 2003 through November 2003.

**OVERALL RESULT:**

As a result of accomplishing this objective, it is intended that 36 small businesses will contract directly with ETP for funding by March 31, 2003, using up to \$500,000 in ETP funds. The evaluation of the pilot project will give insights into possible changes to processes for larger businesses, and which of the pilot changes are worthwhile.



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**GOAL 7: Reduce barriers to successful participation in the ETP program.**

**OBJECTIVE 2: Work to expand industry-based workforce training by studying and replicating exemplary models. (Deferred Objective – subject to reconsideration in 2003-04 Strategic Plan.)**

This objective supports ETP's role as a catalyst in encouraging businesses to increase training for workers on their own. It seeks to identify exemplary training models that businesses can adopt. However, given current resource constraints, it is recommended that this objective be deferred until FY 2004/05, with the exception of clarification from Executive Staff on the purpose and process for establishing models.

**TASKS/MILESTONES:**

1. Review results of new ETP effectiveness study to determine needs and project criteria. (Executive Staff and P&R)
2. Directive from Executive Staff establishes criteria for staff, based on findings of effectiveness study. (Executive Staff and P&R)
3. Monitors document exemplary models. (Development and Monitoring Units)
4. Collect fiscal data on successful projects. (Fiscal Unit)
5. Develop model training programs. (P&R and Development Units)
6. Evaluate and revise programs modeled after exemplary training projects. (P&R, Dev/Monitoring)
7. Profile successful models on web site. (P&R)

**RESOURCES:**

The P&R Unit would have lead for this objective, with assistance from Monitoring, Development, Executive Staff, and Fiscal. It is estimated that .01 PYs from Executive Staff and .02 PYs from P&R will be required for FY 2002/03.

It is estimated that the following resources would be required to accomplish the rest of this objective when it is undertaken: P&R (0.23 PYs); Executive (0.2 PYs); Monitoring (0.1 PYs); Development (0.1 PYs); Fiscal (0.1 PYs). Additional resources need to be secured before this objective can be undertaken (BCP approval).

**TIMELINES:**

1. Review results of effectiveness study by October 2003.
2. Directive from Executive Staff prepared by December 2004.
3. Documentation of exemplary models and collection of fiscal data begins January 2004.
4. Model programs developed from January through December 2004.
5. Evaluation and revisions to models from January through June 2005.
6. Web site updates in June 2005.

**OVERALL RESULT:**

As a result of accomplishing this objective, it is intended that by June 2005, two profiles of successful training models will be accessible on the ETP web site to promote employer-funded training (one with ETP funding, and one without).

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**GOAL 8: Continuously increase the efficiency and effectiveness of the ETP program.**

**OBJECTIVE 1: Undertake a study to identify better training project evaluation tools. (Deferred Objective – subject to reconsideration in 2003-04 Strategic Plan.)**

These objective will help the Panel better determine the extent to which it is achieving its overall mission. It will provide a framework for the Panel to use in determining which training projects it should funded, according to specific evaluation criteria. However, additional resources are required for staff to undertake this objective, and it is recommended this study be deferred until such resources are available.

**TASKS/MILESTONES:**

1. Determine the feasibility of developing and using a model for projects, according to specific criteria.
2. If feasible, develop work plan and methodology for developing a model. (P&R)
3. Conduct research and develop recommendations. (P&R, Development, Monitoring, CRU)
4. Implement approved recommendations. (P&R, Development, Monitoring, CRU)

**RESOURCES:**

The P&R Unit would have lead for this objective, with support from Development, Monitoring and CRU Units.

It is estimated that the following resources would be required to accomplish this objective when the study is undertaken: P&R (0.25PYs); Development (0.1 PYs); Monitoring (0.1 PYs); CRU (0.1 PYs). Additional resources need to be secured before this objective can be undertaken (BCP approval).

**TIMELINES:**

1. Feasibility of project evaluation model determined by August 2003.
2. Work Plan and methodology developed August to October 2003.
3. Research conducted from October 2003 to June 2004.
4. Implementation in July 2004.
5. Reported in FY 2003/2004 Annual Report on 11/30/04.

**OVERALL RESULT:**

By July 1, 2004, as a result of accomplishing this objective, it is intended that the Panel will have a project evaluation model to assist in determining which projects should be funded.

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**GOAL 8: Continuously increase the efficiency and effectiveness of the ETP program.**

**OBJECTIVE 2: Improve on-line access for ETP customers.**

ETP's mission is to provide assistance to California business. Providing on-line access ensures that program information is available and accessible to customers, so that they can successfully participate in the program.

**TASKS/MILESTONES:**

1. Develop on-line orientations and eligibility determinations. (ITU, ARU, Marketing, and P&R Units)
2. Determine other needed improvements in on-line access. (ITU, P&R, Fiscal, Development, ARU, CRU and Monitoring Units)

**RESOURCES:**

The ITU Unit has lead for this objective, with assistance from ARU, Marketing, Development, Monitoring, Fiscal and P&R Units.

It is estimated that the following resources will be required to accomplish this objective in FY 2002-03: ITU (1 PY); ARU (.25 PYs); Marketing (.25 PYs); Development (.02 PYs); Fiscal (.02 PYs); P&R (.02 PYs); CRU (.01 PYs). It is estimated the following resources will be required in FY 2003-04: ITU (1 PY); Monitoring (0.3 PYs); Development (.25 PYs); ARU (0.5 PYs); CRU (.02 PYs); P&R (0.2 PYs); Marketing (0.1PYs).

In addition to the tasks shown above, staff will defer certain activities related to this objective, until additional resources are secured (BCP approval). The deferred activities include coordination of on-line improvements to agreement revisions and amendments, signatory authorizations, applications, and web site resources.

**TIMELINES:**

1. Orientation/eligibility process development from July 2002 to January 2003.
2. Implement and test on-line orientations and eligibility process by February 2003.
3. Determine other improvements to on-line from January 2003 through June 2003.
4. Work plan for on-line improvements developed from July through August 2003.
5. Begin development of on-line amendment process, on-line applications, and electronic signatory forms by December 2003.
6. Develop customer resources for web site from July through October 2003.
7. Publish resources in November 2003.
8. Implement new on-line processes from January to June 2004.

**OVERALL RESULT:**

As a result of accomplishing this objective, it is intended that all feasible program processes will be available on-line for ETP customers, and vital information regarding their projects will also be readily available to them. Specifically, the orientation, eligibility determination, application, and amendment phases will be fully on-line, requiring no paper documents. Customers will be able to verify the status of projects, issues pending, approved payment amounts, approved trainees, and a new source of helpful tools to use in developing and administering the project.

**FY 2002-03 Strategic Plan  
Action Plans**

**GOAL 8: Continuously increase the efficiency and effectiveness of the ETP program.**

**OBJECTIVE 3: Automate processes, forms, and procedures – streamlining and expediting the contracting process for ETP customers.**

ETP's guiding principles state that programs and processes shall continually be improved, and administered with the highest degree of professionalism. Automation and streamlining processes are good approaches to achieving these ideals. In FY 2003/04 the one way that ETP anticipates fulfilling this objective is by improving tracking and reporting of training.

**TASKS/MILESTONES:**

1. Reengineer the development process to incorporate automated forms and procedures, including Chart 2, for displaying training plans.

**RESOURCES:**

The Executive Staff will provide support for this objective, with primary responsibility for task completion coming from Development, P&R and ITU Units. (Executive, Development, P&R, and ITU)

It is estimated that the following resources will be required to accomplish this objective in FY 2002-03: Executive Staff (.02 PYs); Development (.04 PYs); P&R (.04 PYs); ITU (.08 PYs).

**TIMELINES:**

1. Automation occurs between August 2002 and June 2003.

**OVERALL RESULT:**

As a result of accomplishing this objective, it is intended that the number of processing hours required for the application/contracting process will be reduced by 10 percent or more. Automation of the Chart 2 will be available February 2003.

**FY 2002-03 Strategic Plan  
Action Plans**

**GOAL 8: Continuously increase the efficiency and effectiveness of the ETP program.**

**OBJECTIVE 4: Assess data needs pertinent to each of the Panel's critical functions; ensure that automation processes yield necessary data. (Deferred Objective – subject to reconsideration in 2003-04 Strategic Plan.)**

ETP's guiding principles state that programs and processes shall continually be improved. A data needs assessment will facilitate such improvement. Given lack of resources, it is recommended this objective be deferred until FY 2003/04.

**TASKS/MILESTONES:**

1. Workgroup established to study data needs. (ITU, P&R, Development, Monitoring, Audits, and Executive Staff)
2. Issues studied, and recommendations presented. (ITU, P&R, Development, Monitoring, Audits, and Executive Staff)
3. Programming and data dictionary update completed. (ITU and P&R)

**RESOURCES:**

The ITU and P&R Units would have lead for this objective, and would be assisted by Fiscal, Development, Monitoring, and Audits.

It is estimated that the following resources would be required to accomplish this objective when it is undertaken: ITU (0.25 PYs); P&R (0.5 PYs); Development (0.1 PYs), Monitoring (0.1 PYs); Executive (0.1 PYs); Audits (0.1 PYs).

Additional resources need to be secured before this objective can be undertaken (BCP approval).

**TIMELINES:**

1. Workgroup established July 2003.
2. Issues studied from August through December 2003.
3. Recommendations approved 12/31/03.
4. Programming from January through April 2004.

**OVERALL RESULT:**

As a result of accomplishing this objective, it is intended that all ETP units will have access to reliable and necessary data, to fulfill their critical functions.

**FY 2002-03 Strategic Plan  
Action Plans**

**GOAL 8: Continuously increase the efficiency and effectiveness of the ETP program.**

**OBJECTIVE 5: Automate administrative processes to better track program administration, marketing and research expenditures.**

ETP's guiding principles state that programs and processes shall continually be improved, and administered with the highest degree of professionalism. Automation of administrative processes will help improve administration of training project funding. In FY 2002/03, ETP hopes to improve fiscal management by researching and adopting an automated fiscal accounting system for ETP.

**TASKS/MILESTONES:**

1. Investigate feasibility of conversion to CALSTARS system for accounting and contractor payments. (Fiscal)
2. If CALSTARS not feasible, identify expenditure data elements for tracking system, and develop automated tracking system. (Administration, Fiscal, ITU, P&R and Marketing Units)

**RESOURCES:**

The Administration and Fiscal Units have lead for this objective, with assistance from ITU, P&R and Marketing Units. It is estimated that the following resources will be required to accomplish this objective in FY 2002-03: Administration (.04 PYs); Fiscal (.25 PYs); ITU (.50 PYs); P&R (.01 PYs); Marketing (.01 PYs).

In addition to the tasks shown above, staff will defer certain activities related to this objective, until additional resources are secured (BCP approval). The deferred activities include the preparation for, and conversion to CALSTARS. The deferred activities will require 2.0 PYs for Fiscal, .01PYs for Administration, .04PYs for ITU (in lieu of .50 PYs in FY 2002/03), and approximately \$35,000 of administration funds to enter an interagency agreement to use CALSTARS.

**TIMELINES:**

1. Feasibility study by March 2003.
2. Expenditure tracking system proposal developed and evaluated by June 2003.

**OVERALL RESULT:**

As a result of accomplishing this objective, it is intended that a decision will be made regarding how all fiscal systems will be automated, whether through CALSTARS, or an internally developed system of expenditures, by June 2003.

**FY 2002-03 Strategic Plan  
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**GOAL 8: Continuously increase the efficiency and effectiveness of the ETP program.**

**OBJECTIVE 6:** Continue an ongoing review of training-related regulations and policies, including: a) refining criteria for basic industries/out-of-state competition; b) addressing issues relevant to apprenticeship training; c) re-evaluating appropriate types and levels of employer contributions; and d) determining when employment retention requirements should be modified.

ETP must administer its program in accordance with laws, regulations, and policies. The Panel supports this objective by continuously reviewing regulations and policies, including public input, in developing new policies, and enhancing current ones.

**TASKS/MILESTONES:**

1. Convene Regulation Review Workgroup. (Legal, Development, Monitoring, CRU, P&R, ARU, Audit, and Executive Staff)
2. Solicit input on policies and regulations, and update accordingly. (Legal, Development, Monitoring, CRU, P&R, ARU, ITU, Audit, and Executive Staff)
3. Revise regulatory calendar, and complete OAL Calendar for Panel. (Legal Unit)
4. Convert from SIC to NAICS industry codes. (ARU, P&R, ITU)

**RESOURCES:**

The Legal Unit has lead for this objective, with assistance from ARU, ITU, Monitoring, Development, Audit, CRU, P&R, and Executive Staff.

It is estimated that the following resources will be required to accomplish this objective in FY 2002-03: Legal (.50 PYs); ARU (.50 PYs); ITU (.25 PYs); Monitoring (.08 PYs); Development (.08 PYs); Audits (.08 PYs); CRU (.04 PYs); P&R (.25 PYs); Executive (.08 PYs).

In addition to the tasks shown above, staff will defer one activity related to this objective, until additional resources are secured (BCP approval). The deferred activity is to update the indices for legislation and regulations, requiring 0.1 PYs from either P&R or Legal Units.

**TIMELINES:**

1. Regulation Review Workgroup meets in January 2003.
2. Input obtained, and updates to regulations/policies on ongoing basis.
3. Regulatory Calendars completed by January 31, 2003.
4. NAICS conversion occurs from November 2002 through January 2003.

**OVERALL RESULT:**

As a result of accomplishing this objective, it is intended that outstanding issues affecting ETP regulations and policies will be addressed by June 2003, and new issues will be calendared for later review.

**FY 2002-03 Strategic Plan  
Action Plans**

**GOAL 8: Continuously increase the efficiency and effectiveness of the ETP program.**

**OBJECTIVE 7: Explore creating a customer advisory committee to help guide IT initiatives. (Deferred Objective – subject to reconsideration in 2003-04 Strategic Plan.)**

In recent years, there have been many advances in technology, and new requirements regarding IT usage. In keeping with the guiding principles to administer ETP with the highest degree of professionalism, and form partnerships, it seems reasonable to investigate the necessity of forming a customer advisory committee for IT initiatives. However, it is recommended this objective be deferred until sufficient staff resources can be secured.

**TASKS/MILESTONES:**

1. Develop a proposal for Panel consideration as part of the FY 2003/04 Strategic Plan update. (Executive, Development, Marketing, P&R, and ITU)

**RESOURCES:**

The Executive Staff would have lead for this objective, with assistance from Marketing, P&R and ITU Units, as needed.

It is estimated that the following resources would be required to accomplish this objective when it is undertaken: Executive Staff (0.2 PYs); Marketing (.01 PYs); P&R (0.01 PYs); ITU (0.01 PYs).

Additional resources need to be secured before this objective can be undertaken.

**TIMELINES:**

1. Proposal presented to Panel at Strategic Plan work session in April 2003.

**OVERALL RESULT:**

ETP's success ultimately depends on how well it serves its customers – the companies using ETP to improve their business processes, the workers that increase their wages and job security through skill acquisition, and the public through a robust, healthy California economy. The Panel can benefit by establishing an advisory committee of partners and stakeholders to augment the input directly received from companies, workers and the public through its meeting processes. The Executive Staff will research possible mechanisms for achieving this objective and report to the Panel in April as to possible approaches to pursue as part of the FY 2003/04 Strategic Plan.



**FY 2002-03 Strategic Plan  
Action Plans**

**GOAL 9: Increase the skills and employability of the workforce in areas of high unemployment.**

**OBJECTIVE 1:** Target at least \$15 million of available training funds for workers in high unemployment areas, with a focus on helping the working poor move to higher-wage jobs.

ETP's mission is to help businesses train workers and promote a healthy California economy. In certain areas, the economy is more depressed than other areas, as evidenced by high unemployment rates. Providing workers with good jobs in these areas will stimulate the economy.

**TASKS/MILESTONES:**

1. Update HUA policy and train staff on identifying HUA/working poor needs. (P&R, Marketing, Development and CRU)
2. Develop method to report and assess ETP training impacts in HUAs and on the working poor. (P&R, Fiscal)
3. Explore automation of HUA/working poor data. (P&R, ITU, Marketing, CRU, Development, Monitoring, and Fiscal Units)
4. Measure and determine if prior performance levels for projects are met or exceeded - \$6.6 million for 5,500 working poor trainees, and \$23.7 million for HUAs overall funded in 2001/02. (P&R, Fiscal)

**RESOURCES:**

The Marketing and Development Units have lead for this objective, with assistance from Fiscal, ITU, CRU and P&R Units.

It is estimated that the following resources will be required to accomplish this objective in FY 2002-03: Marketing (.01 PYs); Development (.12 PYs); Fiscal (.12 PYs); ITU (.04 PYs); CRU (.08 PYs); P&R (.25 PYs), Executive Team (.10 PYs).

In addition to the tasks shown above, staff will defer implementation of the automated HUA tracking system until FY 2003/04.

**TIMELINES:**

1. Policy revision and implementation occurs from August 2002 through June 2003.
2. Manual method of reporting was initiated July 1, 2002.
3. In June 2003, the feasibility of automated reporting will be researched.
4. Assessment of funding levels from June to July 2003.

**OVERALL RESULT:**

As a result of targeting \$15 million to HUAs, it is intended that at least \$7 million will be funded for at least 6,000 working poor trainees, by June 30, 2003.

**FY 2002-03 Strategic Plan  
Action Plans**

**GOAL 9: Increase the skills and employability of the workforce in areas of high unemployment.**

**OBJECTIVE 2: Increase the number of high wage jobs for working poor trainees.**

This objective helps ETP strengthen the skills of California workers and maintain a healthy state economy.”

**TASKS/MILESTONES:**

1. Market to high wage-paying employers in HUAs. (Marketing Unit)
2. Determine number of working poor last year that subsequently received high wage jobs. (P&R Unit)
3. Develop career ladders with HUA contractors. (Marketing and Development Units)

**RESOURCES:**

The Marketing and Development Units have lead for this objective, with assistance from Monitoring and P&R Units.

It is estimated that the following resources will be required to accomplish this objective in FY 2002-03: Marketing (.12 PYs); Development (.25 PYs); P&R (.04 PYs), Executive Team (.10 PYs).

**TIMELINES:**

1. Marketing efforts from July 2002 through June 2003.
2. Assessment of high wage jobs from November 2002 to March 2003.
3. Career Ladder project developed on a continuous basis in fiscal year 2002-03.

**OVERALL RESULT:**

As a result of accomplishing this objective, it is intended that at least 25 percent of former working poor trainees will subsequently be promoted or otherwise receive substantial gains in income.

**FY 2002-03 Strategic Plan  
Action Plans**

**GOAL 10: Take a leadership role in developing job training programs and in conducting related research in the new Labor and Workforce Development Agency.**

**OBJECTIVE 1:** In order to improve the legislative and budget processes and strengthen its leadership role in the Labor and Workforce Development Agency (LWDA), submit a Budget Change Proposal to establish ETP's own departmental funding code.

With its own funding code, ETP can have better control over fulfilling its mission, and have a greater chance for leadership in promoting the value of employee training.

**TASKS/MILESTONES:**

1. Request approval from LWDA to proceed with request. (P&R Unit)
2. Submit request to DOF, via BCP for approval. (P&R Unit)
3. Support BCP by attending Budget Hearings. (Executive Staff)
4. Obtain final approval from DOF. (P&R)

**RESOURCES:**

The Executive Staff has lead for this objective, with assistance from the P&R Unit.

It is estimated that the following resources will be required to accomplish this objective in FY 2002/03: Executive Staff (.01 PYs); P&R (.25 PYs).

In addition to the tasks identified above, staff will defer certain activities related to this objective, until final approval from DOF is obtained. The deferred activities include selecting the process and level of direct involvement in operational/project and administrative accounting and budgeting, filling those positions and training new employees. The interagency agreement with EDD must be reviewed and revised according to the service levels required.

**TIMELINES:**

1. This request was rejected by LWDA in September 2002, and may be resubmitted for FY 2004/05 at a later date.
2. The original submittal to DOF was 9/13/02.

**OVERALL RESULT:**

The intent is that ETP should be fully independent in a functional and administrative manner from EDD, in order to improve its effectiveness as a partner in the LWDA.

**FY 2002-03 Strategic Plan  
Action Plans**

**GOAL 10: Take a leadership role in developing job training programs and in conducting related research in the new Labor and Workforce Development Agency.**

**OBJECTIVE 2: Partner with California Workforce Investment Board to develop collaborative approaches in support of economic development and workforce preparation.**

The California WIB is an important entity to partner with in the development of the economy and workforce.

**TASKS/MILESTONES:**

1. Convene meetings with State WIB to coordinate marketing activities to develop joint training program(s). (Marketing Unit)\
2. Develop and implement joint training program(s). (Marketing)

**RESOURCES:**

The Marketing Unit has lead for this objective, with .02 PYs support from Executive Staff.

It is estimated that .10 PYs will be required to accomplish this objective in FY 2002/03.

**TIMELINES**

1. Meetings scheduled for January 2003 and June 2003.
2. Implementation will begin in February 2003.

**OVERALL RESULT:**

As a result of achieving this objective, it is intended that partnering with the State WIB will produce additional joint training programs.

**FY 2002-03 Strategic Plan  
Action Plans**

**GOAL 10: Take a leadership role in developing job training programs and in conducting related research in the new Labor and Workforce Development Agency.**

**OBJECTIVE 3: Conduct a forum with other stakeholders in the economic development and workforce preparation arenas to exchange ideas and strategies for eliminating duplicative services and coordinating services to better serve customers.**

Forming partnerships with other organizations providing similar services will promote the value of employee training. A high degree of professionalism calls for elimination of duplicative services, and streamlining of training avenues available to employees.

**TASKS/MILESTONES:**

1. The P & R and Marketing units will brainstorm to determine who in the stakeholder community should be contacted, and, in coordination with Executive Staff, create an agenda for a forum.
2. The P & R and Marketing units will contact stakeholders in economic development and workforce preparation arenas and invite them to participate in forum.
3. Conduct the forum.
4. The P & R and Marketing units will collect and summarize ideas and strategies for coordination of services.

**RESOURCES:**

The P&R Unit will be the lead on this objective, with support from the Marketing Unit.

It is estimated that the following resources would be required to accomplish this objective when it is undertaken: P&R (.02PYs); Marketing (02 PYs), and the Executive Team (.27 PYs).

Additional resources need to be secured before this objective can be undertaken.

**TIMELINES:**

1. The forum will be held in February, 2004.

**OVERALL RESULTS:**

This forum will bring together business, labor, and government leaders to explore the need for workforce development by workers already in the workforce. The outcome of this forum will be a greater appreciation of the need for workforce investments in California's economy and a set of policy initiatives that this leadership can champion in all three sectors – business, labor, and government.